STATE OF NORTH DAKOTA

PROJECTS SUPPLEMENTAL MANUAL - ANALYZING PROJECTS ONLINE

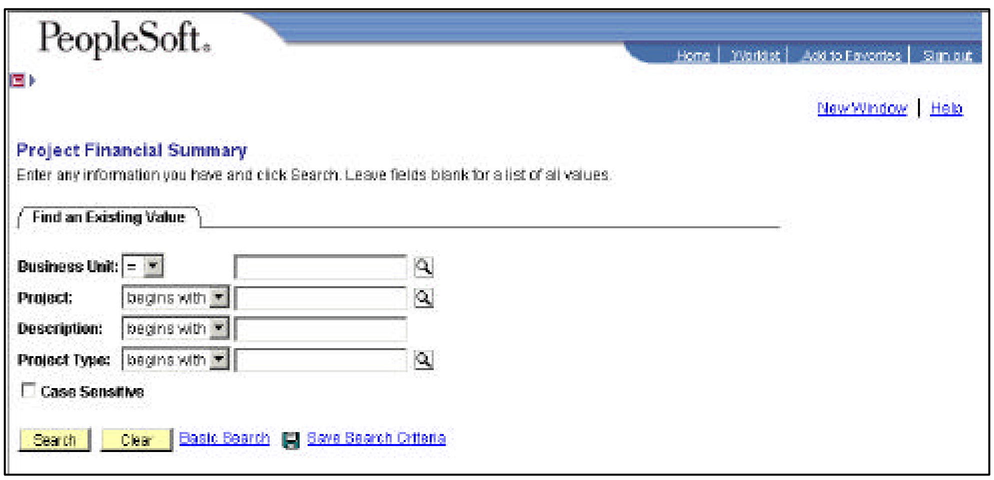
NOTE: The following pages on Analyzing Projects in PeopleSoft are best used when you want a quick, online summary of your projects' transactions for a period of time, such as monthly, quarterly, or yearly. If you prefer to track transactions on a daily or weekly basis, or if you want more detailed information, you may follow the navigation and instructions beginning on page 75 of your Projects Manual. You can also view the detailed items by going to the **Project General** page of a specific Project, click on **Project Activities** then click the **Resources** hyperlink for the Activity ID you wish to view. Then continue the instructions on page 77.

VIEWING RESOURCES BY ANALYSIS TYPE

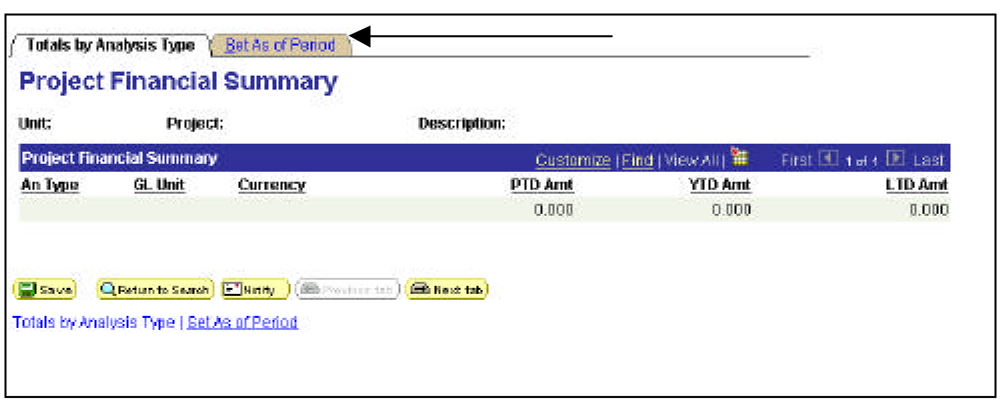
The Project Financial Summary enables you to analyze a project's resources online.

Navigation

- Projects
- Review Costs
- Summarize by AnalysisType

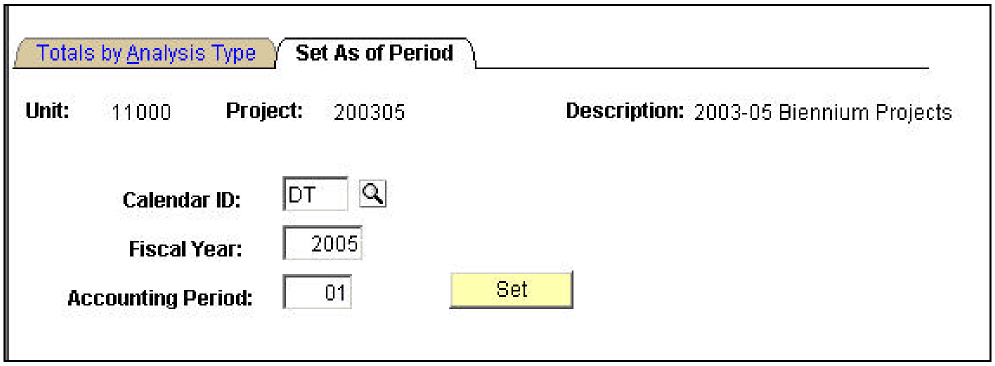


Enter your business unit and project you wish to view. Click the Search button, and it will bring you to this screen, with your agency's project information listed:

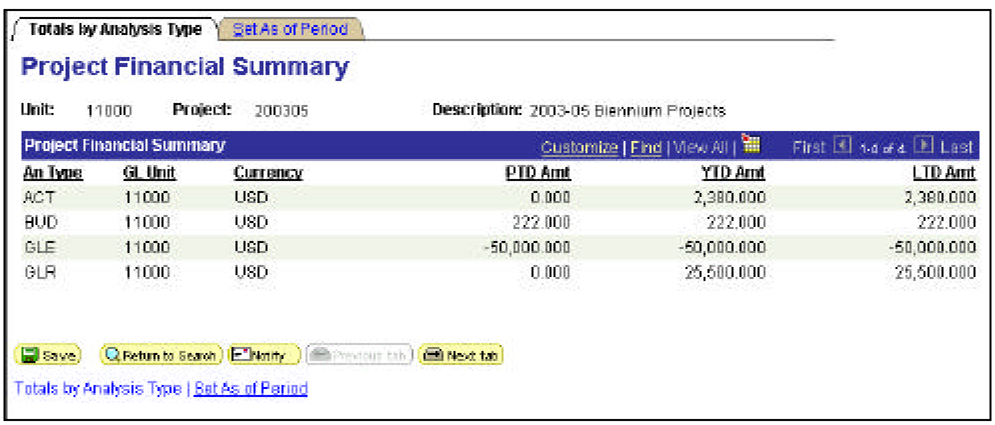


To view the Project Financial Summary data, you must set the "As of Period" first. The Set As of Period enables you to select a time period to review.

In the example below, we chose to use Fiscal Year as the Calendar ID, and we want to view the resources for July 2004:



Click the "SET" button.
Click on the "Totals by Analysis Type" tab, and you will pull up any resources that fit these criteria:



Totals by Analysis Type | Set As of Period

Project Financial Summary

Unit: 11000 Project: 200305 Description: 2003-05 Biennium Projects

Project Financial Summary — Customize | Find | View All | First 1-4 of 4 Last

An Type	GL Unit	Currency	PTD Amt	YTD Amt	LTD Amt
ACT	11000	USD	0.000	2,380.000	2,380.000
BUD	11000	USD	222.000	222.000	222.000
GLE	11000	USD	-50,000.000	-50,000.000	-50,000.000
GLR	11000	USD	0.000	25,500.000	25,500.000

Save | Return to Search | Notify | Previous tab | Next tab

Totals by Analysis Type | Set As of Period

PTD = Period to Date; YTD = Year to Date; LTD = Life to Date

The Project Financial Summary component groups resources by analysis type, not by analysis group.

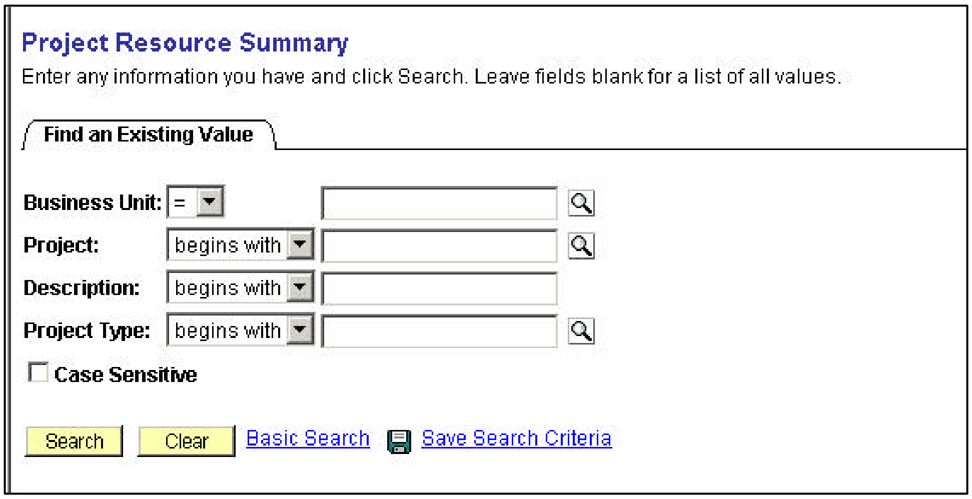
Click **SAVE** if you wish to view this summary again.

VIEWING RESOURCES BY RESOURCE TYPE AND/OR CATEGORY

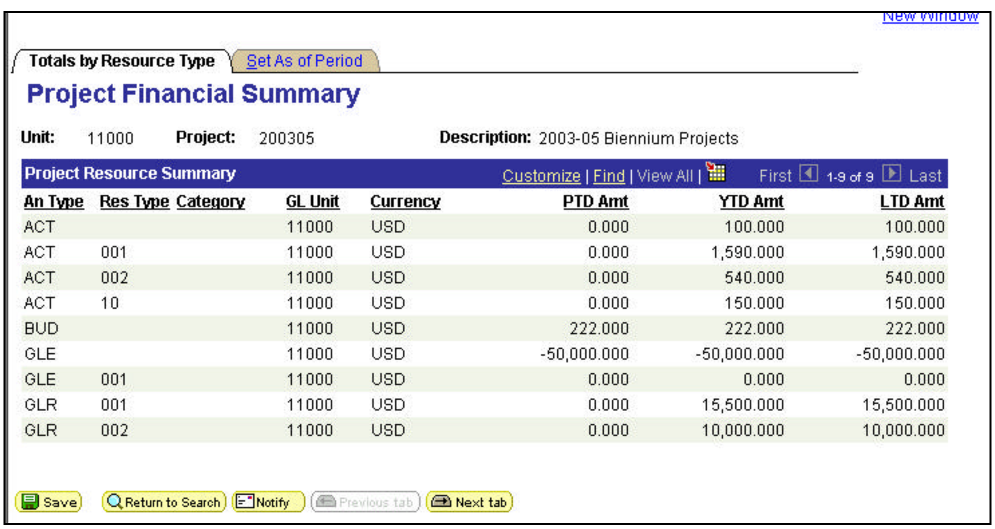
The Project Resource Summary page shows summary amounts by resource type and category. You will only need to use this function if your agency uses resource types in Projects.

Navigation

- Projects
- Review Costs
- Summarize by Resource Category



Enter your business unit and project you wish to view. Click the Search button, and it will bring you to this screen, with your agency's project information listed:



An Type	Res Type	Category	GL Unit	Currency	PTD Amt	YTD Amt	LTD Amt
ACT			11000	USD	0.000	100.000	100.000
ACT	001		11000	USD	0.000	1,590.000	1,590.000
ACT	002		11000	USD	0.000	540.000	540.000
ACT	10		11000	USD	0.000	150.000	150.000
BUD			11000	USD	222.000	222.000	222.000
GLE			11000	USD	-50,000.000	-50,000.000	-50,000.000
GLE	001		11000	USD	0.000	0.000	0.000
GLR	001		11000	USD	0.000	15,500.000	15,500.000
GLR	002		11000	USD	0.000	10,000.000	10,000.000

Again, you may change the fiscal period you wish to view by going to the "Set As of Period" tab and entering variables to narrow the search.

If you want to group the items on the screen by resource type, just click on the heading "Res Type", and the program will sort the items in resource type order for you.

Click **SAVE** if you wish to view this summary again.

FLEXIBLE ANALYSIS DRILLDOWN

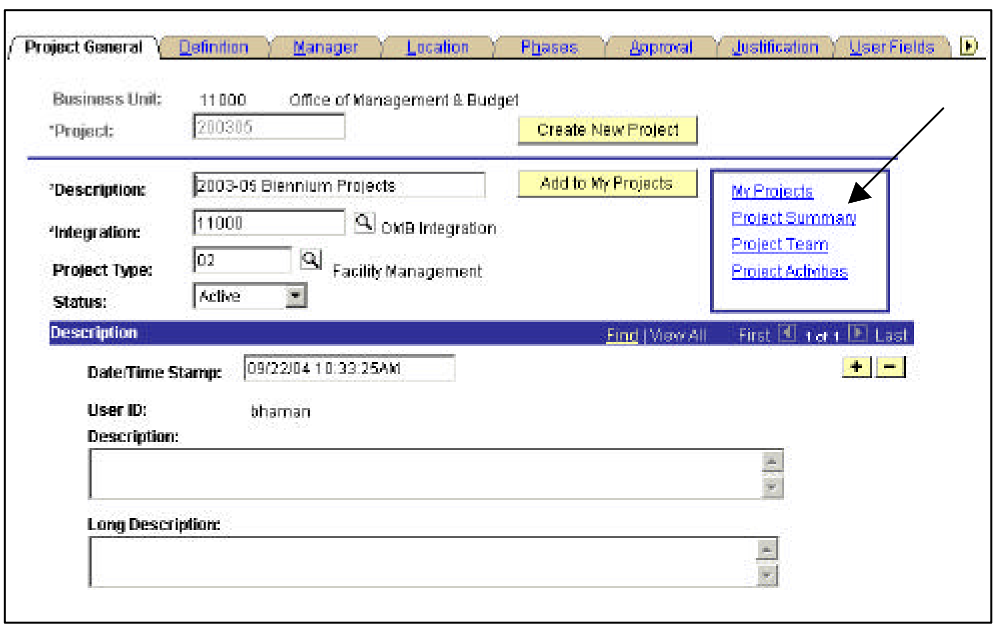
Flexible analysis is a method of analyzing a project's costs at these levels:

- Project
- Activity
- Resource
- Resource Category
- Resource Subcategory

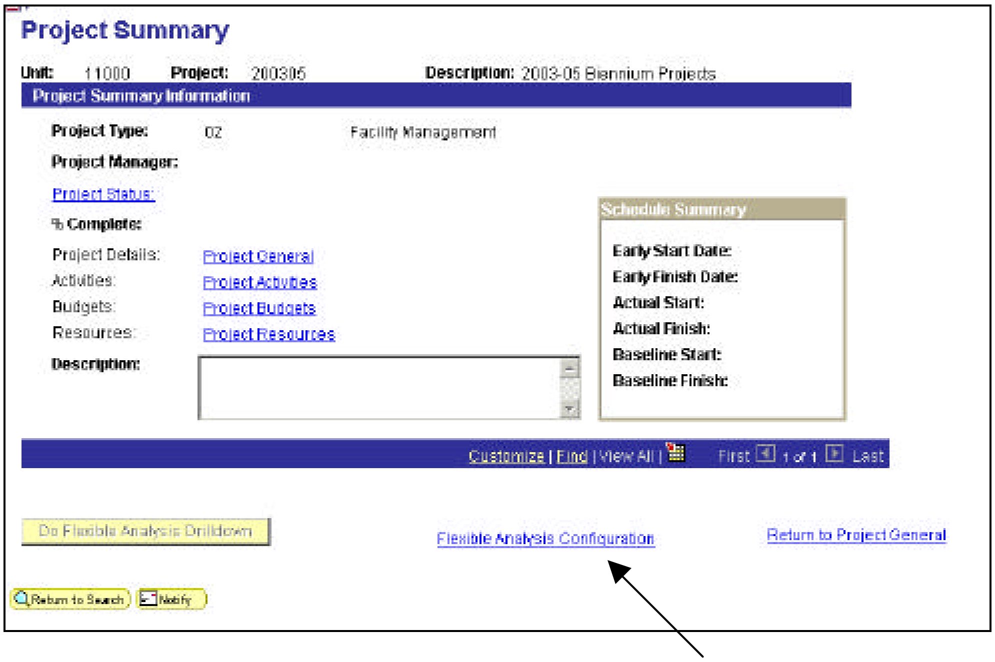
The **Project Summary** page allows you to perform flexible analysis on your project(s) based on user-definable requirements. In order to perform analysis, you must first set up one or more templates.

Navigation

- Projects
- Projects
- General Information
- Projects General (of chosen project)



When you click on the blue hyperlink for **Project Summary**, it will take you to this page:



PROJECT SUMMARY PAGE

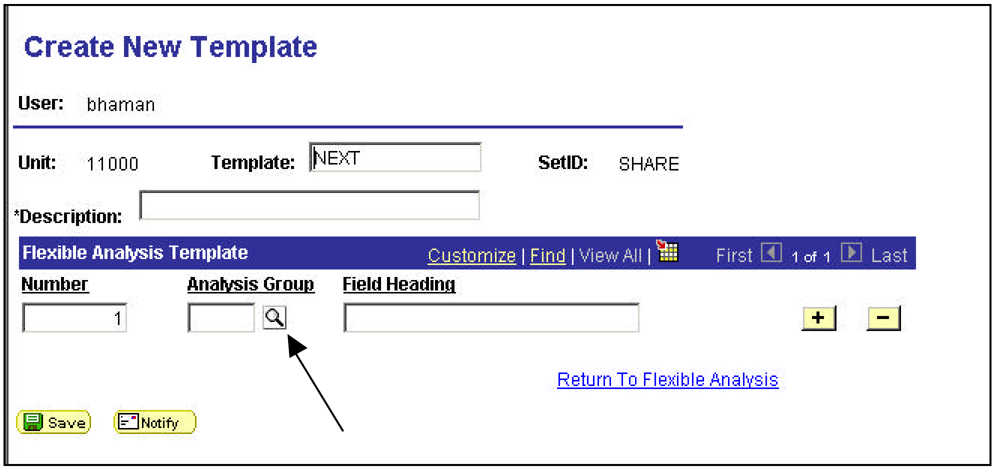
Explanation of some of the blue hyperlinks:

Project Status	Link to the Project Status page (if used)
Project General	Link to the Project General page for this project
Project Activities	Link to the Project Activities page for this project
Project Budgets	Link to Budget Scenarios already set up
Project Resources	Link to view a Resources report for the Activity ID's of this project.

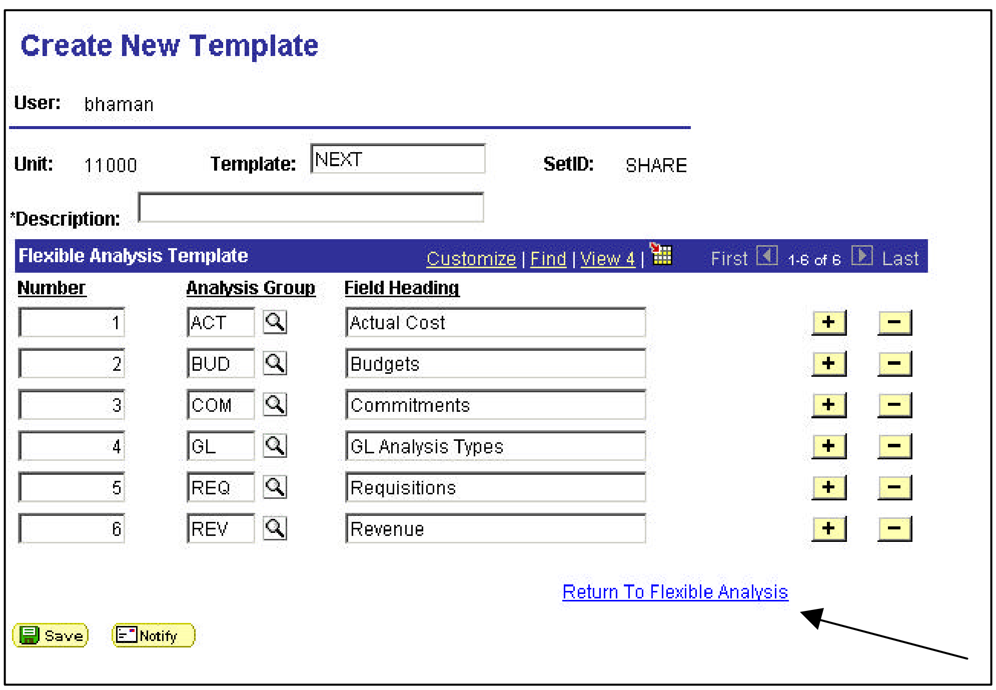
To create a template, or edit an existing template, that you can use to analyze resource transactions defined within a project, first click the **Flexible Analysis Configuration** link as shown above.

CREATE A NEW TEMPLATE

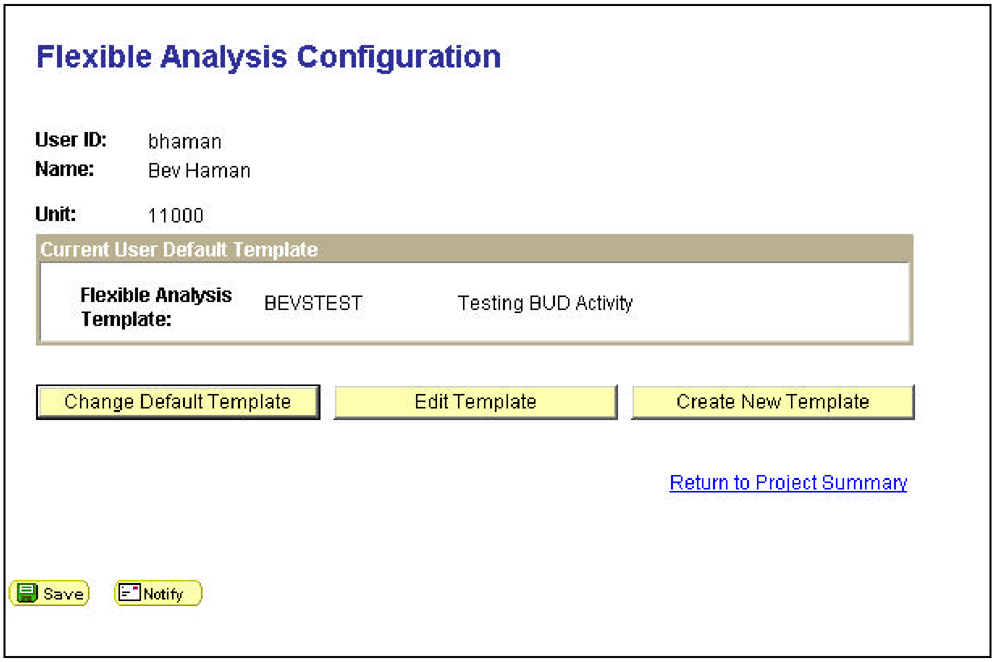
Only those templates created under your user ID are available to you. If there are no templates available, the system will automatically bring you to the Create New Template page.



Give the template a short description name in the "Template" field that will identify the type of report you are creating, with a longer name in the "Description" field. Click on the magnifying glass under "Analysis Group" to select the analysis groups you wish to view. Below is an example of the most common analysis groups. However, you may choose as few as "ACT" and "BUD" if you just want to track expenses quickly. Once you have chosen the analysis groups you want and given this template a name and description, click **SAVE**.



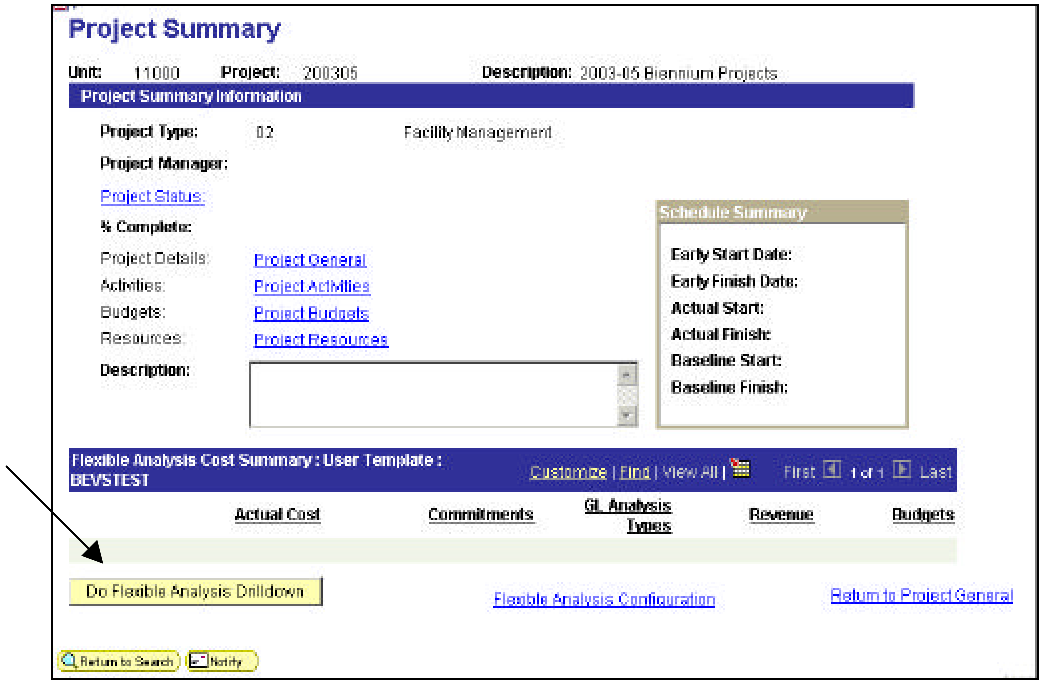
Click on **Return To Flexible Analysis,** and it will bring you to the following screen:



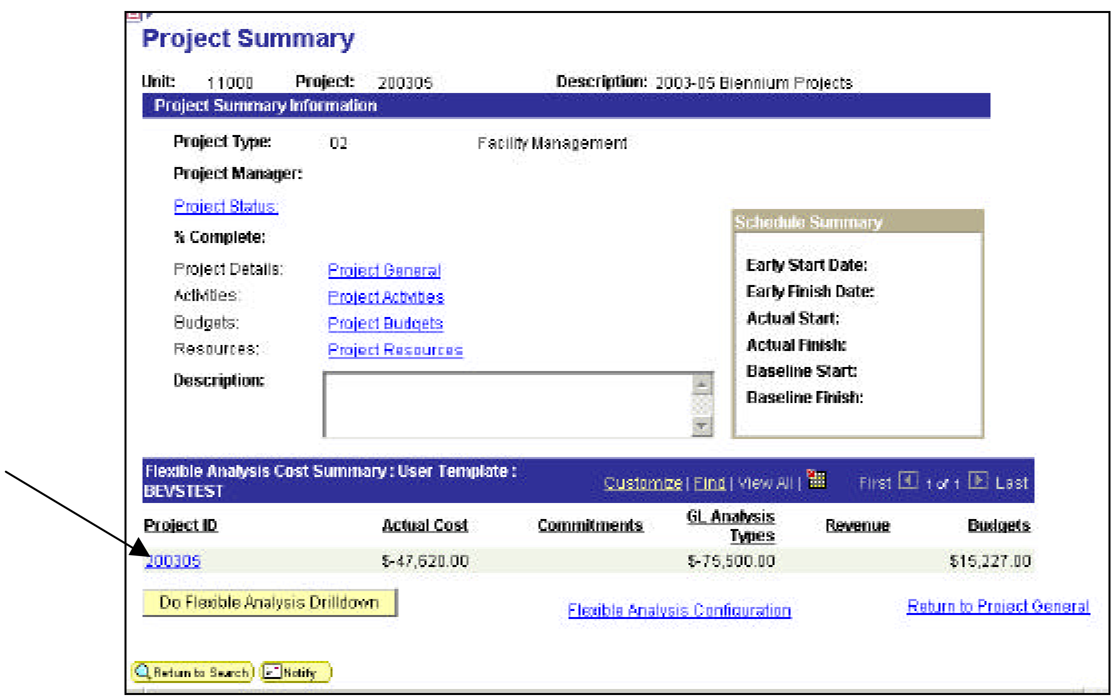
The name of your template should show up here. **NOTE:** If a template has already been saved, the system will take you to this screen rather than the "Create New Template" screen. You then have four options:

- Click **Return to Project Summary** to use this template;
- Edit this saved template;
- Change the default template shown to another; or
- Create a new template by pressing that button and following the directions above.

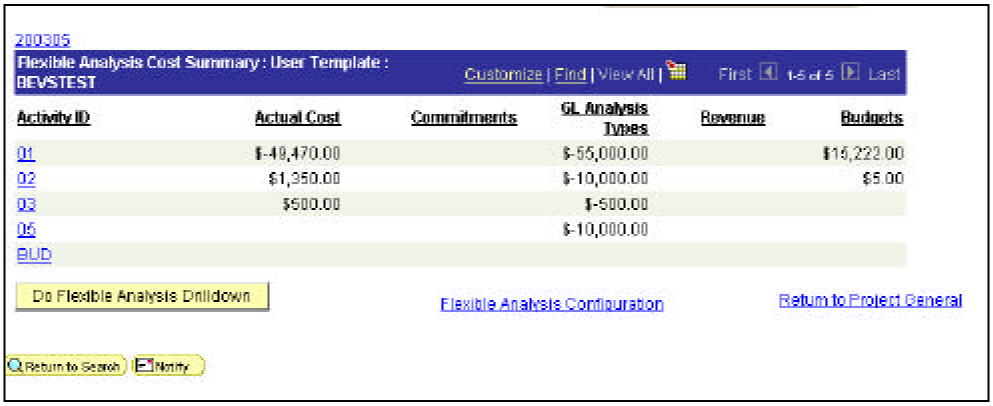
To use the chosen configuration template, click on **Return to Project Summary** and you will return to the Project Summary screen.



Press the “Do Flexible Analysis Drilldown” button, and the following screen will appear:



This screen shows you the totals for this project for the analysis groups you chose. If you wish to see the breakdown by Activity ID, click on the blue hyperlink of the Project ID as shown above. Then the following screen will appear:


200305

Flexible Analysis Cost Summary : User Template : BEVSTEST   Customize | Find | View All | First 1-5 of 5 Last

Activity ID	Actual Cost	Commitments	GL Analysis Types	Revenue	Budgets
01	$-48,470.00		$-55,000.00		$15,222.00
02	$1,350.00		$-10,000.00		$5.00
03	$500.00		$-500.00		
05			$-10,000.00		
BUD					

Do Flexible Analysis Drilldown   Flexible Analysis Configuration   Return to Project General

Return to Search   Notify

If your agency uses budgets in Projects, that information will show on this screen also. When you are done, you can return to Project General using the blue hyperlink or "Return to Search."